Allianz SNA

Client Web Space
User Guide

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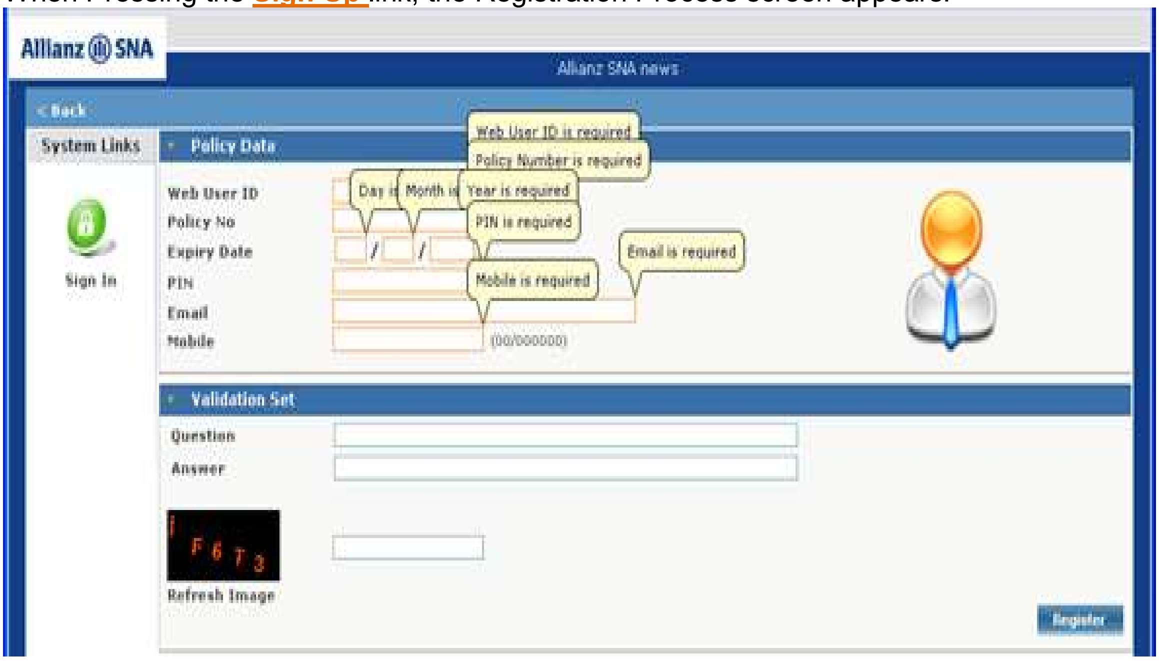
I- Sign Up/Registration Process

To be able to access the Client Space Module and View all your issued policies, You should make an online registration (**Sign Up**) in order to get a User Id and Password.

When Pressing the **Sign Up** link, the Registration Process screen appears:



Please pay attention to your input data which must be identical to the one stated on your contract/policy documents. In case of any change in your contact information (email or mobile), do not hesitate to contact us in order to update it in our files.

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The Registration Process is divided into 2 mandatory sections that should be filled in:

- **Policy Data**: (6 mandatory fields to be entered)
  - **Web User ID**: It is the access Key to the application used when you need to login (Ex: Enter your name).
  - **Policy no:** It is the Insured/Policyholder Policy Number as shown in his contract/policy (Use the following format ABC/123 (Ex: SHP/16).
  - **Expiry/Maturity date**: Policy maturity/expiry date as shown in the contract/policy (Use the following format dd/mm/yyyy (Where dd = day (23) in the Month, MM = Month(04) and yyyy = Year (2021) Expiry Date = 23/04/2021).
  - **PIN**: The Insured Identification Number as shown in the contract/policy above the Age field and displayed numerically. (Ex: 123456).
  - **Email:** The e-mail address as stated in your application form or in any document related to your contract/policy and used as a contact electronic address. Client can receive notifications from our web application (Ex: Your login credential will be sent to this address after registration).
  - **Mobile:** The Insured/Policyholder Mobile Number as specified in your application form or in any document related to your contract/policy.

- **Validation Set:** (3 mandatory fields to be entered)

  This Section **should be filled and saved by the Client**. Since whenever he forgot his User Id and/or Password and in order to reset his password, he should reply to the entered Questions and Answers.

  - **Question:** Question to be created for validation purpose (Ex: What is your Name?)
  - **Answer:** Answer to the question, to be used for validation purpose (Ex: Samir).
  - **Verification code** should be entered as it is appearing in the image (Case Sensitive). You can click **Refresh Image** link if you want to change the displayed code (the code is unclear for ex) and re-enter it again.

Register Button:

After filling in all required fields, clicking the **Register** button could result to 2 scenarios:

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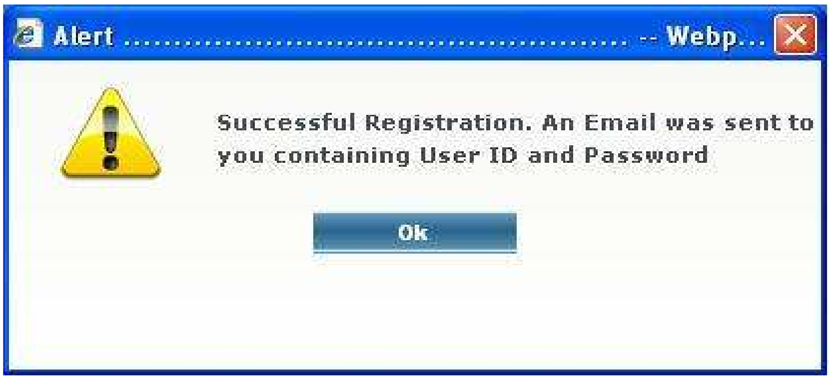
➢ Failed Registration:

- If the verification code entered is wrong, the below error message appears and you must re-enter again the verification code.
- If Policy Information does not match Insured/Policyholder Policy Data, an error message appears and you must re-enter again the Policy Data as shown in the contract/policy.
- If e-mail Address already registered by another user, an error message appears and you must enter a different e-mail address.

➢ Successful Registration:

- If all fields are entered correctly, the below message appears and a personal identification code (**User Id** and **Password**) will be generated and **sent** automatically **to the Client's email address**.



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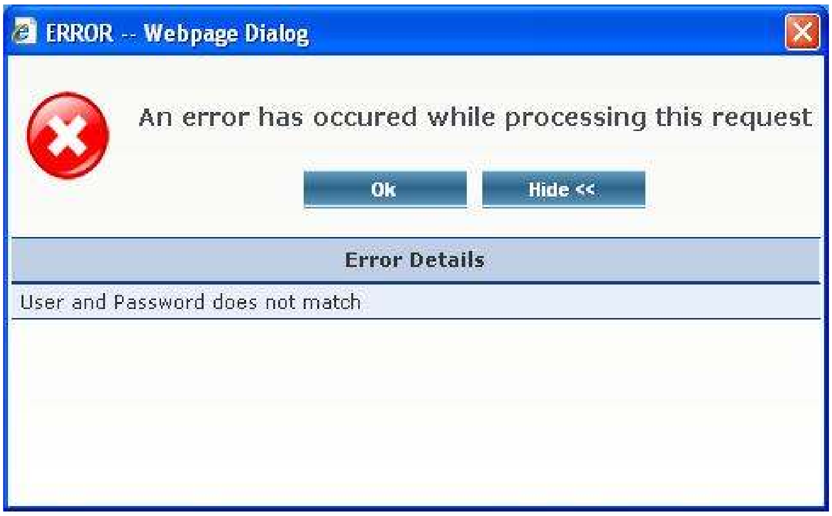
II- Sign In/Login Process

Whenever you want to login to the Client Space Module, you should enter your assigned personal identification code **User Id** and **Password** (already received on your email address) and then Click **Sign In** button.

Wrong User Id and/or Password:

- If you enter a wrong User Id and/or Password, a blocking message will appear:



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Forgot Password:

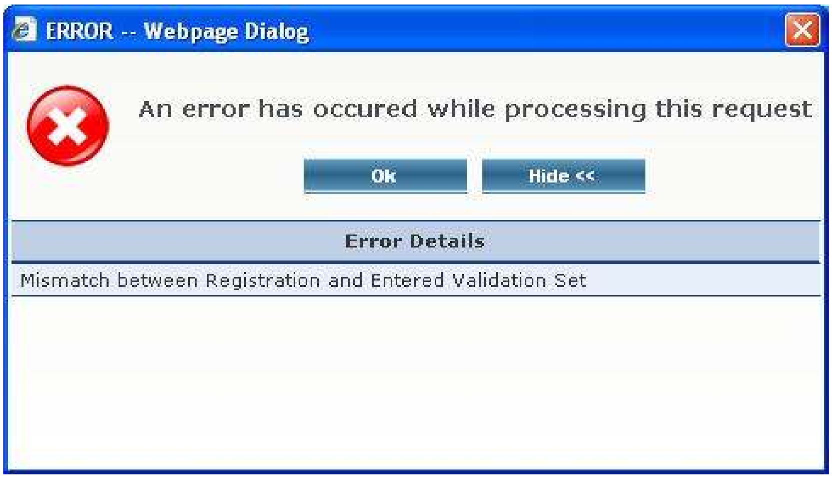
In case you have forgotten your Password, you can use the **Forgot Password** button. This Process will allow you to reset your password in condition to enter correctly the Valid **User Id** and **Email** already defined at the level of the Registration Process screen section.

- Clicking on the **Get Validation Set** button. You will be prompted to enter the Validation Set Answer.
  - **Question**: It is displayed as entered at the level of the Registration Process screen/ Validation Set section
  - **Answer**: Enter the same answer entered at the level of the Registration Process/Validation Set section/Answer field.

- Click **Reset Password** button.

Failed Validation Set:

- If a wrong answer is entered, the below message appears:



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➢ Successful Validation Set:

- If all entered data are valid, the below message appears:

Now you can use the **User Id** and the **New Password** received on your email address to login to the application.

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III- Profile Screen

First Login:

When you enter the Client Space Module for the first time, the application prompts you to the first login screen, called **Profile** screen:

This screen is divided into 3 sections:

- **Profile:** In this section, you can update the contact information data:
  - **Mobile** number by entering a new one.
  - **Email** address.

- **Validation Set:** In this section, you can **change** the registration entered Validation Set:
  - **Question.**
  - **Answer.**

- **Change Password:**
  When Selected, you can change your password by entering your old password, **New** desired **Password** and re-enter the new one for confirmation purpose.
  - **Old Password**
  - **New Password**
  - **Confirm Password**

PS: It is recommended to **change** the system **Password upon the first login** process.

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- Clicking the **Submit** button 

system will validate all entered data (same as Registration Process) and if all entered data are valid below message appears and the User Profile will be updated.

- Clicking the **Cancel** button 

will undo all entered information.

You can use the **Logout** link 

that exists in the left part of the page to exit the Profile screen.

If **no change** occurred in the **Profile** process and after clicking the **Submit** button, system will open the Personal Insurance Policy Details screen.

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IV- Personal Insurance Policy Details

After the first sign in and after submitting your profile, below screen appears:

- **Client Information:** This section contains the Policyholder Name, Marital Status and Policyholder Contact Address.

- **Show My Policies under:** This section contains policyholder's policies.

  - **Product drop down list:** This list contains products for which the policyholder has policies. You can select a product from the list of available ones and then click on the  button so that the grid displays all policies related to this product.

  - **Policy No:** Enter a specific policy no in the Policy no field and then click on the  button. Policy No should be entered in the following format ABC/123.

  - 

: In order to view policy details, select a policy from the list of available ones in the grid and click on the 

In the left part of each screen you will have the below System Links:

Home: You can use this link to go back to the above screen.

Logout: You can use this link to exit from the application.

Update profile: You can use this link to update your current profile. For more details refer to Profile screen.

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V- Symphonia Product

If you select Symphonia (SHP) product for example and click on 

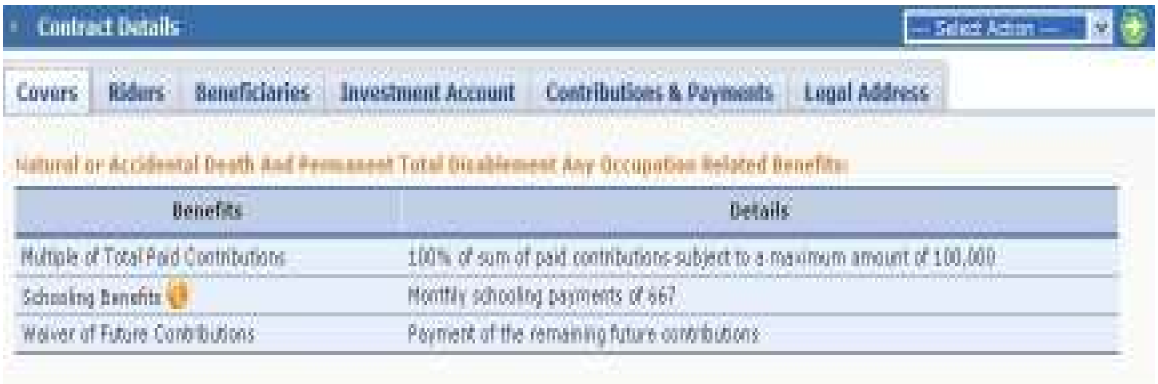
in the Personal Insurance Policy Details, below screen appears:

- **Contract Information:** In this section you can view your contract detailed information (Contract no, Contract Owner name, Insured name, Joint Life name if exists, Inception and Expiry Dates of your Contract, Contract Currency, Payment mode and Payment frequency, Contract and Payment Period, Agent Name, Contract Status).

  : click on this button in order to view agent's phone number and email address if available.

- **Contract details:**

  a) Covers tab



In this tab, you can view all available benefits with details related to each benefit.

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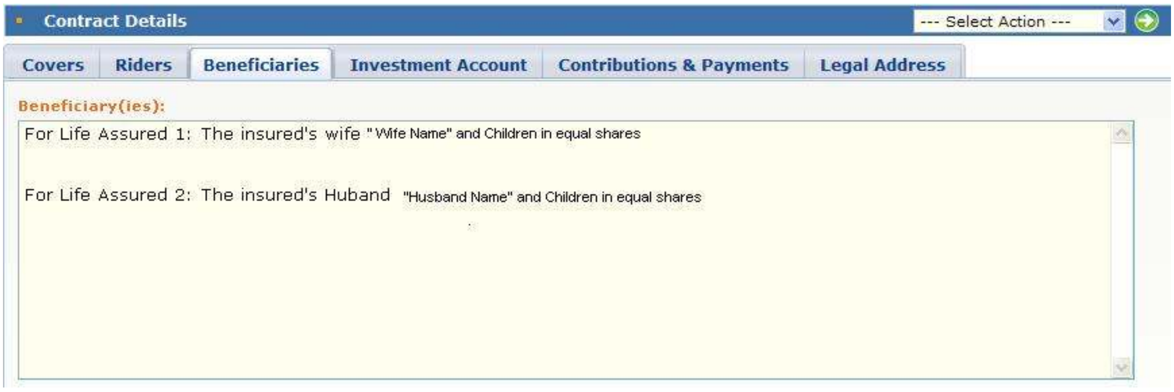
In case the Schooling benefit is available under your policy, click on the button where its distribution between selected dependants will be detailed where you can view Dependants name, Date of birth, Age and Schooling Tuition as shown below:

b) *Riders tab*

In this tab, you can view:

1. Insured persons with the following details: Name, Relation, Date of Birth, Age and Gender under the **Assured** section.
2. Available riders under the selected policy insured and for each rider its details under the **Related Covers** section.

c) *Beneficiaries tab*



Under this tab, you can view your policy's beneficiaries.

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d) Investment Account tab

Contract Details — Select Action —

Covers | Riders | Beneficiaries | Investment Account | Contributions & Payments | Legal Address

Investment Account:

Regular Contributions Account

Print

Fund Name	Number of Units	Offer Price (USD)	Offer Price as @	Fund Value (USD)
A - Monetary Fund	-	-		3,971.46
_CA-02 - Internal Fund US.$	-	-		252.00
Sub-Total Regular Contributions Account				**4,223.46**
Total Investment Account				**109,769.44**

Under this tab, you can view:

1. Your Regular Contributions Accounts or your Booster Accounts by selecting one of these available options under the **Investment Account** drop down list.
2. You can also use the Print button to print your Statement of Portfolio.

N.B.: In case you are unable to print, kindly install the PDF Acrobat Reader on your PC

e) Contribution & Payments tab

Contract Details — Select Action —

Covers | Riders | Beneficiaries | Investment Account | Contributions & Payments | Legal Address

Contribution	Annual Contribution	Annual Variation Rate	Frequency Contribution
Regular Plan	6,000.00	N/A	1,500.00
Riders	336.00	N/A	84.00
Total Contributions Without Boosters	**6,336.00**		**1,584.00**

Fund	Regular Contribution Fund Allocation	Fund Share
A	Monetary Fund	100 %
B	PIMCO Global Investors Series Low average Duration Fund	-
C	PIMCO Global Investors Series Total Return Bond Fund	-
D	PIMCO Global Investment Grade Credit Fund	-
E	PIMCO Global Investors Series Diversified Income Fund	-

Additional Boosters:

- One Booster with 100,000.00 USD Starts At 1st Year

Fund	Irregular Contribution Fund Allocation	Fund Share
C	PIMCO Global Investors Series Total Return Bond Fund	20 %
P	Allianz RCM Rohstoffonds	20 %
E	PIMCO Global Investors Series Diversified Income Fund	15 %

Under this tab, you can view:

1. Annual Contributions along with the Frequency of Contribution and Annual Variation Rate if exists.
2. All Funds offered within this product including those considered under your policy along with their Share %

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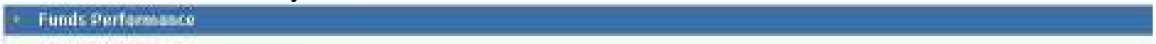
f) Legal Address tab

Under this tab, you can view your Legal Address details.

- **Funds Performance**

Select **SHP Fund performance** from the --- Select Action --- drop down list and then click on  so you can view Funds Performance since a certain date.



Fund Code	Description	C/Y	Value	Value Date	Performance
A	Monetary Fund	USD	1.02	31/12/2010	+0.00 %
B	PIMCO Global Investors Series Low average Duration Fund	USD	11.28	14/01/2011	-4.27 %
C	PIMCO Global Investors Series Total Return Bond Fund	USD	22.62	14/01/2011	+1,53 %
D	PIMCO Global Investment Grade Credit Fund	USD	12.80	14/01/2011	+0.95 %
E	PIMCO Global Investors Series Diversified Income Fund	USD	14.61	14/01/2011	+0.76 %
F	PIMCO Global Investors Emerging Market Bond Fund	USD	30.67	14/01/2011	+1,49 %
G	Allianz RCM US Equity	USD	101.40	14/01/2011	-3.66 %
H	Allianz RCM Europe Equity Growth	USD	172.94	31/12/2010	+0.00 %
I	Allianz RCM Asia Pacific	USD	17.28	31/12/2010	+0.00 %
J	Allianz RCM China	USD	51.26	31/12/2010	+0.00 %
K	Allianz RCM BRIC Equity Fund	USD	7.35	31/12/2010	+0.00 %
L	Allianz RCM Global Emerging Markets Equity	USD	107.32	31/12/2010	+0.00 %
M	Allianz RCM Oriental Income	USD	87.74	31/12/2010	+0.00 %
N	Allianz-dit Global Eco Trends	USD	67.52	31/12/2010	+0.00 %
O	Allianz RCM Global Agriculture Trends	USD	16.59	31/12/2010	+0.00 %
P	Allianz RCM Rohstoffonds	USD	190.84	31/12/2010	+0.00 %
Q	Allianz RCM Islamic Global Equity Opportunities	USD	90.03	31/12/2010	+0.00 %
R	Allianz RCM Islamic Global Emerging Markets Equity	USD	89.51	31/12/2010	+0.00 %

You can use the  Close button to exit from this screen.

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- **Contribution Payments**

Select **Contribution Payments** from the --- Select Action --- drop down list and then click on so you can view your policy dues where payments are listed by descending order of the Due Date.

Contribution

Unpaid Only　　Unpaid Contribution: 0

Status	Due Date	Description	Total Amount	Discount Amount	Unpaid Amount	Paid Amount
Waiting for Collection	07/01/2011	Contribution	332.00	0.00	0.00	332.00
Waiting for Collection	07/12/2010	Contribution	332.00	0.00	0.00	332.00
Paid	10/11/2010	Contribution	433.00	0.00	0.00	433.00

Payment Mode	Payment Date	Paid Amount	Details
clearing	15/12/2010	433.00	

- ➢ Check the Unpaid Only checkbox to view only Unpaid records Due Date and detailed Amounts.
- ➢ Unpaid Contribution: In this field is displayed only the policy total contribution amounts not yet paid.
- ➢ If the contribution is paid, you can see details related to this payment(payment mode if in account or clearing or check with check ref and date.., payment date and the paid amount).
- ➢ You can also view contribution still waiting for collection.

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